

CONTRACT TRUST CALL #178
February 10, 2024

RECORD

DISCLAIMER Hello Everyone. Today is Saturday, February 10, 2024. Welcome to our Contract Trust Conference Call #178. We are not accountants, tax professionals, lawyers or currency dealers. We are not engaged in rendering legal, tax, accounting or other professional advice. Should you require those services, you should retain competent advice from a professional in that field.

WELCOME Thanks for joining us today. We are Indicator Information Institute. My name is Carol Werelius and Jim Knox and I have these calls every 2nd and 4th Saturday of the month. These calls are recorded and available on our website, www.indicatorinformation.com, www.indicator-calls.com and www.iiicalls.com. As we get closer and closer to our expected windfall event, we thought this would be a good time to review our Common Law Contract Trust, and why we think it is the best vehicle for you to protect your assets.

We are happy to answer your Trust questions, that's why we're here. Many of you ask about the actual exchange and what to expect. That is NOT our area of expertise and we have been asked not to speculate about procedures, so please don't ask. As always, your Trust questions are welcome. *6 to raise your hand.

1. Most of you are expecting a huge financial event, hopefully in the very near future. This event, like most important events in one's life, requires some advance preparation. A couple things come to mind; asset protection and keeping your wealth in your family for years to come.

2. We have all heard about LLCs, Corporations, statutory Trusts and Common Law Trusts. These entities all have their place. Some provide better business benefits, some better asset protection, some better privacy and some just replace a will. We feel that our Common Law Contract Business Trust rises to the top in providing all of the above. Our Contract Trust provides superior asset protection allowing you to be in total control, all the while insuring your privacy and anonymity.
3. We have been talking to you about Contract Trusts and common law for the last several years. The Trust that we use is based on the Massachusetts Business Trust. When looking it up in a Law library, you will find it in the B as in Boy section, not in the T section with all other trusts. It is a unique entity that is not a grantor trust, nor is it revocable. It is based on the law of contracts. We, as Americans are guaranteed the right to contract by our Constitution.
4. Common Law Contract Business Trust is a mouthful, so we shorten it by simply referring to it as a Contract Trust. It easy to create and operate. You exchange your assets into the Contract Trust for Trust Certificate Units. The Trust then owns your assets. You, and even members of your family, may be appointed trustees. As Trustee, you still manage, control and enjoy the benefits and income of the trust's assets as if you still owned them.
5. The Contract Trust doesn't die when you do. Successor Trustees of your choice assume control of the Trust's assets; there are no issues of probate, death taxes or any legal or government interference.
6. The Contract Trust is an entity created to live, It is private; you never lose control of your assets. Property transfer is immediate and tax-free. It has a limited life of 25 years, which can be renewed every 25 years by merely writing a Minute.
7. Contract Trusts can protect your assets from bankruptcy and judgments. This is not a Living Trust. Living Trusts avoid probate, but they are born to die, as such they do not provide asset protection. The assets in Living Trusts are subject to federal and state taxes, and do not offer the business and tax benefits available with a Contract Trust.

8. You control the assets and the income the Contract Trust produces. This is not a secret nor new form of business; it is constitutionally protected and upheld by the Supreme Court of the United States. Patrick Henry created the oldest Common Law Trust in the U.S. To my knowledge, it still survives today from its creation in the 1600's.
9. The benefits of the Contract Trust are many:
 - a. It is created by Contract, as guaranteed by the US Constitution and is completely personalized.
 - b. The Trust owns the assets, you don't, but you manage and control those assets.
 - c. It is ideal for business and personal use, and it is valid in all 50 states.
 - d. It is an agency of commerce that enjoys constitutional Rights.
 - e. It provides a tax free start-up with NO government registration.
 - f. It limits liability and ensures financial privacy.
 - g. It creates artificial poverty.
 - h. It works with Limited Liability Companies.
 - i. It avoids Medicaid/MediCare issues.
 - j. It provides lawsuit protection, and judgment proofs assets.
 - k. It totally avoids probate, inheritance and estate taxes.
 - l. It can even serve as a prenuptial agreement.
10. For most people the single biggest feature of the Contract Trust is that you can become the Trustee. Quite simply, there is no one between you and your money.
 - a. The Trust does not rely on any state laws or regulations for its power or authority. The Trust Organization is a contract in trust format. It derives its legality and lawfulness from Article I, Section 10 of our Constitution, which preserves and protects the unalienable rights of all Americans to enter into a contract.
 - b. This irrevocable Trust owns its assets in fee simple (meaning 100% of the asset) that is managed by one or more Trustees. The assets of the Trust will never be subject to probate or inheritance/estate taxes.
 - c. The assets of the Trust are protected from third party creditors who may have an issue with you personally.

- d. Because it is not registered in any state, your privacy and anonymity are pretty much guaranteed.
11. This Trust is a contract, and since we can't contract with ourselves, we use a third party, called a Creator. The Creator can be anyone you choose. Your adult child, your best friend, your brother-in-law, a trusted co-worker. The Creator temporarily takes title to your assets and “exchanges” them into the Contract Trust. Your currency gets into the Trust by the initial exchange. This is all on paper. The Creator doesn't need to know how much of anything you are exchanging into the Trust. As this is an exchange, you need to get something back, right? The Creator gives you \$21 and 100 Trust Certificate Units.
 12. The Creator's last task is to appoint a First Trustee. While he or she can appoint anyone they choose, the typical and most logical appointee for Trustee is you, the original Investor/Exchanger. Lets face it, if you were smart enough to buy all that currency, wouldn't you be the most logical choice to continue to manage it?
 - a. After the appointment of the First Trustee, the Creator exits the Contract Trust, with absolutely no further responsibility, duties, authority or liability regarding the Trust Organization.
 13. The Trust can operate with a single Trustee. In the case of a married couple, one spouse typically appoints the other as Co-Trustee.
 14. You must name a Successor Trustee. Most people choose one or more adult children to be their Successor Trustee. Successor Trustees simply take over the management of the Contract Trust when you and your Co-Trustee die. If your children are minors, you need to name an Interim Successor Trustee.
 15. Many of us will be creating generational wealth when the RV occurs. While you can't “rule from the grave”, you can specify that all future Trustees be a part of your bloodline, to be proven by a DNA test. For instance, you could name your daughter as your Successor Trustee, and she can name her children, but not her husband.
 - a. We have a Spendthrift clause so no future Trustee, Successor Trustee or Certificate Holder shall have any right to alienate, encumber or

hypothecate any interest in the Trust, thus further protecting it from possible future reckless behavior or management.

16. We understand that you may be concerned with the paperwork necessary to keep your Trust up to date, so we have created our members only website www.indicatorinformation.com to guide you.
 - a. The biggest thing to remember with an asset protection plan is “own nothing, control everything”.
 - b. Do not commingle the Trust money with your money, like your Social Security benefit or any 1040 income you earn. That's a big no-no.
 - c. You also need to write periodic minutes to reflect your actions and give your future successor Trustees a history of what you have done with the Trust. An End of Year Minute is essential. There is a sample on the website.
 - d. EVERYTHING you sign as Trustee should state, “As Trustee only and not otherwise.”

17. We have gone to great lengths to provide you with the best personalized, Common Law Asset and Estate Protection Contract Trust available. Years of research have gone into perfecting what we know is unquestionably the strongest tool obtainable for asset protection and estate preservation. In order to make the Contract Trust as easy as possible to implement, we include the following;
 - a. The Contract and Declaration of Trust, the Trust Indenture “Contract” with Specific Minutes for execution of documents and for Trustee and Successor Trustee appointment.
 - b. Trust Certificates showing your Pro-rata share of any Trust distribution.
 - c. An Abstract of Trust for banking purposes.
 - d. Every signature line is personalized and flagged to make it easy for you and your Notary Public to complete.
 - e. We obtain an EIN (Employer Identification Number), which the Trust must have to open a bank account.

- f. Access to our members only website, which hosts a plethora of Minutes, Resolutions and Contracts for your use.
 - g. Websites to easily complete your application.
18. You shouldn't gamble with your family's assets. You can protect your assets, business, family and your future. Saving and securing assets for retirement is a daily challenge. You can have the assurance that money cannot buy and you can have that peace of mind at an affordable price. Indicator Information Institute can show you how to insulate assets from those who some day may wish to claim them. You can protect yourself and your family with a Contract Trust.
19. Contract Trusts have withstood the tests of time and the courtroom. An IRS expert witness called them valid, legal entities in Court. They are approved by the IRS and have been used for generations by many of the wealthiest families in the US to preserve their fortunes.

Jim

Q & A Please no questions about login issues. If you are having difficulty logging in to the website, go to www.3itrustapp.com, login issues. Jim will respond shortly. Be sure you are not using a VPN for another country. You cannot change your password. The login does not work on all phones. Again, we strongly recommend you use Roboform or any other password manager.

It appears that once again, we are very close, so I urge you to be prepared. Typical turnaround time is less than a week, but I expect that to be considerably longer post RV. Our Contract Trusts are well priced at only \$1995 for new clients, and \$1795 for additional Trusts or family members. We also offer a \$300 referral fee for any fully paid new Trust. We DO NOT charge annual fees, custodial fees, or any other recurring costs.

Initially, all you need is a Motherlode Trust, which holds your currency and will be the Trust you use at your exchange. You will probably want additional Trusts

in the future such as Management Trusts, Real Estate, Vehicle, Annuity, Charitable Trusts, etc.

- a. You may have heard that we will need separate accounts for whatever currency you exchange. The key word here is Account. You can open multiple accounts under the same Trust. If you do have more than one Trust, use them for your Exchange.
- b. You may also want our Triple Play, which includes a Pour-over Will, Durable Power of Attorney and Health Care Directive.

Thanks for your time and attention. My name is Carol Werelius. My number is 877-333-5018 or 206-915-4236. I am available between 10 and 6 Eastern time, Monday through Friday. The best way to reach me is by email.

info@indicatorinformation.com. Have a happy and safe weekend! Happy Valentines Day. Go RV and God Bless America!